

457(b) Deferred Compensation Plan Online Changes User Guide

Overview

The County of Riverside offers a voluntary Deferred Compensation Plan to assist employees in meeting their financial goals in retirement. Employees may choose to contribute to Deferred Compensation Plans through Nationwide Retirement Solutions and/or AIG. Traditional deferred compensation contributions are deposited into employees account on a tax deferred basis. ROTH deferred compensation contributions are deducted on an after-tax basis. While employee funds are held within these accounts, they do not pay taxes on gains. Upon an employee's employment separation from the County, they are eligible to withdraw funds or roll them over into another qualified plan. The minimum bi-weekly contribution is \$10.00. The decision to participate in the 457 Deferred Compensation plan is separate from participation in the CalPERS or 401(a) Part-Time and Temporary Employees retirement plans.

Navigation

1) Log into Oracle PeopleSoft 9.2 – Homepage

Here is the link you will need to click to access the database:
<https://hcm92.co.riverside.ca.us/psp/h920prda/?cmd=login>

You will log into Employee Self-Service using your six- digit employee ID and password. This is the same ID and password you use to access your payroll information.

Click on [Forgot Your password?](#) or call (951)955-9900 for assistance if you do not know your password.



ORACLE PeopleSoft
HCM 9.2 Production

User ID

Password

Select a Language


English

Sign In

Enable Screen Reader Mode

[Forgot Your password?](#)

2) Employee Self-Service homepage

If you don't land on this homepage, click the  dropdown list at the top/center of the page and select 'Employee Self-Service'.

IMPORTANT: The pages load best if you **maximize** your PeopleSoft window. This way, you are sure to see all the applications features.

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Employee Self Service



Open Enrollment

There is no Open Enrollment Event, but you have other event available to be processed.

Time



Payroll



Last Pay Date 10/20/2021

Personal Details



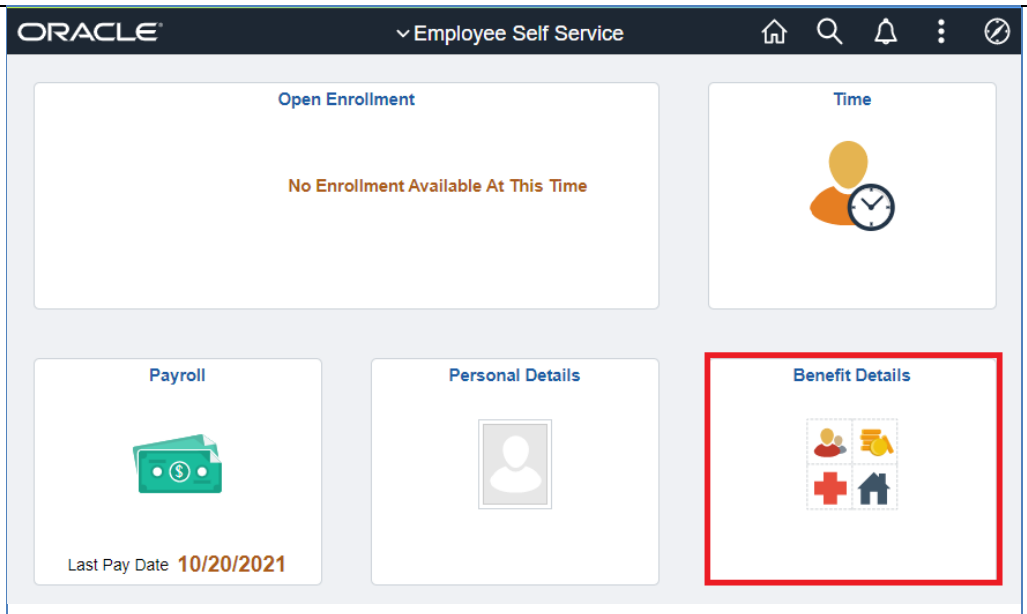
Benefit Details



Action Required

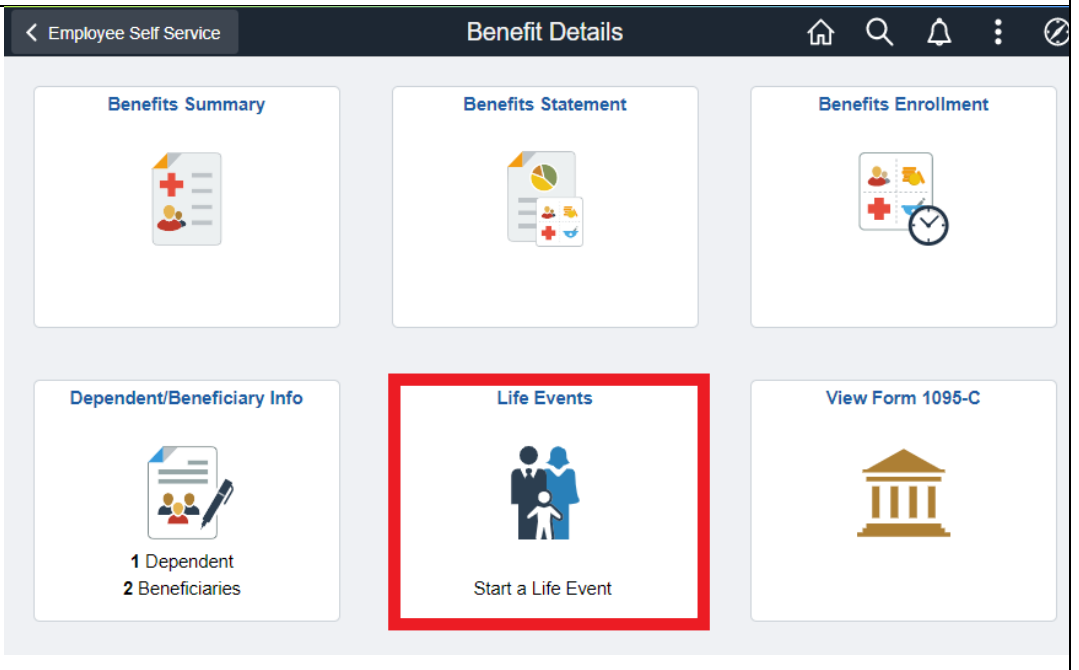
3) Find and click the 'Benefit Details' tile

Note: The tiles may be arranged in a different order on your Employee Self-Service page.



4) Find and click the 'Life Events' tile

Note: The tiles may be arranged in a different order on your Employee Self-Service page.



- 5) a. Select 'Savings Contribution Change' from the list of Life Events.
- b. Enter today's date in the 'As Of' field.
- c. Select 'Start Life Event'

Note: Our system will not allow you to enter a past or future date, you must enter the actual date you are accessing the system. **In most cases your election will go into effect within 2 pay periods unless you enter your election on pay day Wednesday.**

Example:

- 1) Changes submitted on Wednesday pay day, 11-3-2021, will take effect on pay date 11-17-2021.
- 2) Changes submitted on Thursday, 11-4-2021 will take effect on pay date 12-01-21.

If you need an election processed urgently or for a future date, please complete a [Deferred Compensation Change Form](#) and submit it to retirement@rivco.org before payroll closes.

6) Click Next

The screenshot shows the 'Life Events' interface. At the top, there is a navigation bar with 'Benefit Details' and 'Life Events'. Below this, a message states: 'If you are experiencing any of the circumstances below, you may now initiate an event online that will allow you to upload documents of proof, add or change dependents, and make your new benefits elections at your convenience. To begin, select the appropriate Event Type. Then enter the **actual date** of your event. (i.e. Marriage Date, Birth Date, Hire Date, etc).'

The first screenshot shows a list of event types:

- Employee
 - Marriage / Domestic Partnership
 - Birth / Adoption / Legal Guardianship
 - Divorce / End of Domestic Partnership
 - Hire / Rehire Benefits Elections
 - Dependent Coverage Loss/Gain
 - Savings Contribution Change

 A red arrow points to 'Savings Contribution Change'. Below this is an '*As Of' field with a calendar icon and a 'Start Life Event' button. A second red arrow points to the 'Start Life Event' button.

The second screenshot shows the same list, but 'Savings Contribution Change' is selected with a blue radio button. The '*As Of' field now contains the date '10/28/2021'. The 'Start Life Event' button is highlighted with a red border.

The third screenshot shows the 'Savings Change Event' screen. On the left, a progress indicator shows:

- Welcome to the Savings Contribution Change Event (Complete)
- Benefit Enrollment (In Progress)
- Benefits Statements (Not Started)
- Complete Your Event Here (Not Started)

 The main content area is titled 'Welcome to the Savings Contribution Change Event' and contains instructions: 'Using this event allows you to change your Savings plan contribution amount at any time. Please note the change will be reflected in your next paycheck. This guide will take you through all the steps necessary to change your contribution amount. You can also make changes to your taxes if necessary through Employee Self Service, Payroll, Tax Withholding. Documents you will need to have soft-copies available to upload as proof during this event include: Savings Contribution Change' followed by a bullet point: 'None'. At the top right, there are 'Cancel' and 'Next >' buttons, with 'Next >' highlighted in red.

7) Select 'Start My Enrollment'

Savings Change Event

Cancel | < Previous | Next >

- Welcome to the Savings Contribution Change Event
Complete
- Benefit Enrollment**
In Progress
- Benefits Statements
Not Started
- Complete Your Event Here
Not Started

Benefit Enrollment

Now we're ready to prepare your benefit options, based upon the Life Event information that you've entered. Your information will be analyzed to see if there is any impact to your eligibility for benefits, and determine whether changes to your existing enrollments are allowed. Select the 'Start My Enrollment' pushbutton to begin your benefit enrollment.

Start My Enrollment

8) Select the tile for the Plan/Vendor contribution you wish to change

Your file will reflect what your current contributions are.

If you have never contributed before you will need to contact one of our vendors directly, please refer to the [Deferred Compensation Contact List](#). If you do not set up an account with Nationwide or AIG before submitting this change your funds will not be applied to your account.

Savings Change Event

Cancel | < Previous | Next >

- Welcome to the Savings Contribution Change Event
Complete
- Benefit Enrollment**
In Progress
- Benefits Statements
Not Started
- Complete Your Event Here
Not Started

Benefit Enrollment

This page presents all the benefit plans that are open for you to change at this time. Click the plan tiles below to explore your enrollment options, update dependents, and make enrollment changes.

IMPORTANT: Whether you have made changes or not, when you are finished, you must click the blue [SUBMIT ENROLLMENT] button below in the center of the page, in order to proceed.

Also, after you submit your benefit enrollment, you must click the 'Complete Your Event Here' step to mark your event complete for processing.

All of your benefit changes will be effective dated based upon your event date.

▼ Enrollment Summary

Status: Validated

Review Enrollment
Submit Enrollment

Benefit Plans

| | | |
|---|---|---|
| 457 Valic Current: No Coverage New: No Coverage Status: Pending Review Review | 457 Nationwide Current: Nationwide 457 Deferred Comp \$50.00 New: Nationwide 457 Deferred Comp \$50.00 Status: Pending Review Review | VALIC 457 Roth Deferred Comp Current: No Coverage New: No Coverage Status: Pending Review Review |
| Nationwide 457 Roth Def Comp Current: No Coverage New: No Coverage Status: Pending Review Review | | |

9) Make your desired changes to your contribution amount and select 'Done'

To stop deductions, click the button next to the Waive option.

To modify the amount being contributed, alter the dollar amount or percentage being contributed.

457 Nationwide

Cancel | Done

The Profit Sharing plan will provide you with periodic employer contributions based on the performance of the company. Contributions will be delivered to either an individual account or as a wage/salary supplement as defined in the plan document.

▼ Enroll in Your Plan

Plan Name

- Nationwide 457 Deferred Comp

Waive

▼ Contributions

You can enter your contribution as a percent or flat dollar amount but not both. You can not exceed the before-tax and after-tax plan maximums. If you choose to enter percents, the sum of your before-tax and after-tax percents can not exceed 100 percent.

Before Tax Amount Before Tax Percent

Maximum Before Tax Percent 100.00

Contact Information

Phone: 951 9554981 x OPT 2
Email: retirement@rivco.org
Address: RivCo Retirement Contact, P.O. Box 1569, Riverside, CA 92502

If you are making changes online before your current contributions are showing, you will need to click the button next to the name of the plan you are making changes to for the **Contributions** section to appear for that plan.

401(K) plans allow you to prepare for your financial security and build your savings for retirement.

▼ **Enroll in Your Plan**

| Plan Name | |
|---------------------------------------|-------------------------|
| <input type="button" value="Select"/> | Valic 457 Deferred Comp |
| <input type="button" value="Select"/> | Waive |

▼ **Contributions**

You can enter your contribution as a percent or flat dollar amount but not both. You can not exceed the before-tax and after-tax plan maximums. If you choose to enter percents, the sum of your before-tax and after-tax percents can not exceed 100 percent.

Before Tax Amount Before Tax Percent

Maximum Before Tax Percent 100.00

Once you have selected 'Done' a green bar will flash at the top of the refreshed screen.

If you have multiple changes you will need to click on each tile to make adjustments to each plan

As you make your adjustments the tiles will update to show what your *current* election is and what your *new* election will be.

You must complete Step 10 in order to process your requested change(s).

The screenshot shows the 'Savings Change Event' page with a green header bar indicating '457 Nationwide plan selection has been updated'. The page includes a navigation sidebar with 'Benefit Enrollment' selected, a main content area with instructions and an enrollment summary, and a contact information sidebar on the right.

| Enrollment Summary | | |
|--|-------------|-------------|
| Status | Current | New |
| Visited | No Coverage | No Coverage |
| <input type="button" value="Review Enrollment"/> | | |
| <input type="button" value="Submit Enrollment"/> | | |

| Benefit Plans | | |
|--|--|--|
| 457 Valic Current: No Coverage New: No Coverage Status: Visited <input type="button" value="Review"/> | 457 Nationwide Current: Nationwide 457 Deferred Comp \$50.00 New: Nationwide 457 Deferred Comp \$100.00 Status: Changed <input type="button" value="Review"/> | VALIC 457 Roth Deferred Comp Current: No Coverage New: No Coverage Status: Pending Review <input type="button" value="Review"/> |
| Nationwide 457 Roth Def Comp Current: No Coverage New: No Coverage Status: Pending Review <input type="button" value="Review"/> | | |

10) Click the 'Submit Enrollment' button

Once you have clicked the 'Submit Enrollment' button, your *final* changes will be submitted for review and processing.

All elections submitted on pay day Wednesday are effective for the following pay period. Elections submitted on any other day are effective within 2 pay periods.

Benefit Enrollment

This page presents all the benefit plans that are open for you to change at this time. Click the plan tiles below to explore your enrollment options, update dependents, and make enrollment changes.

IMPORTANT: Whether you have made changes or not, when you are finished, you must click the blue [SUBMIT ENROLLMENT] button below in the center of the page, in order to proceed.

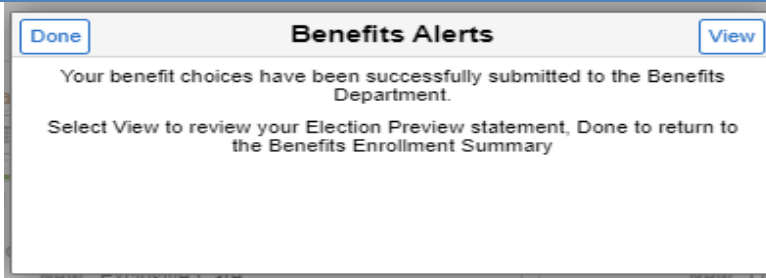
Also, after you submit your benefit enrollment, you must click the 'Complete Your Event Here' step to mark your event complete for processing.

All of your benefit changes will be effective dated based upon your event date.

▼ **Enrollment Summary**

Status Visited

After submitting you will receive this message, click **Done** to return to the previous page.

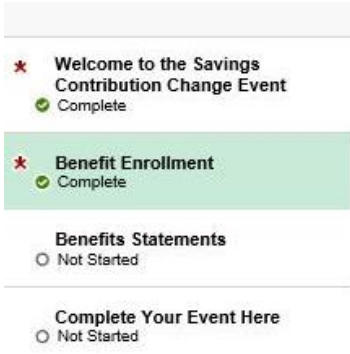


Benefits Alerts

Your benefit choices have been successfully submitted to the Benefits Department.

Select **View** to review your Election Preview statement, **Done** to return to the Benefits Enrollment Summary

Your enrollment is complete once the Benefit Enrollment Tab is labeled Complete




- Welcome to the Savings Contribution Change Event**
Complete
- Benefit Enrollment**
Complete
- Benefits Statements**
Not Started
- Complete Your Event Here**
Not Started

11) To review your election click

Review Enrollment

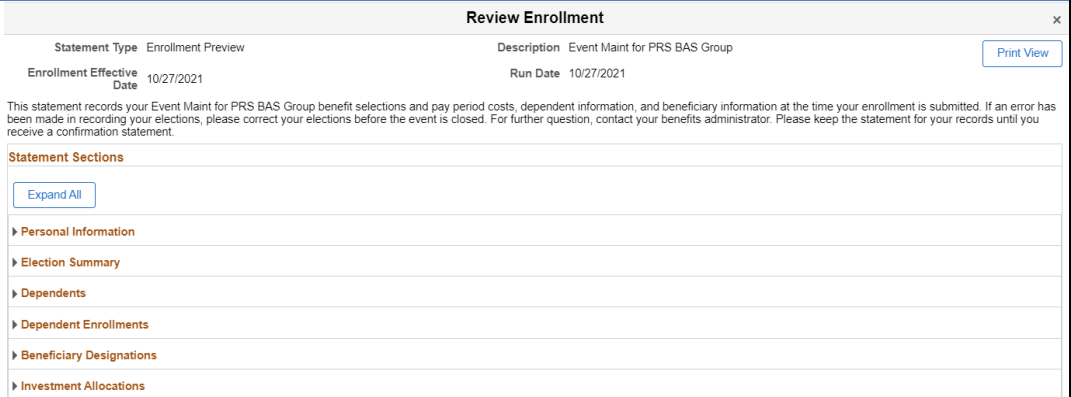
Click **Expand All** to review all your enrollments online

Or you can click  to expand just one section at a time

Click **Print View** at the top right of the page to launch the PDF Election Preview form

Click **X** to close the window

Click **X Exit** then click **Yes** to return to your Employee Self-Service home page.



Review Enrollment

Statement Type: Enrollment Preview Description: Event Maint for PRS BAS Group **Print View**

Enrollment Effective Date: 10/27/2021 Run Date: 10/27/2021

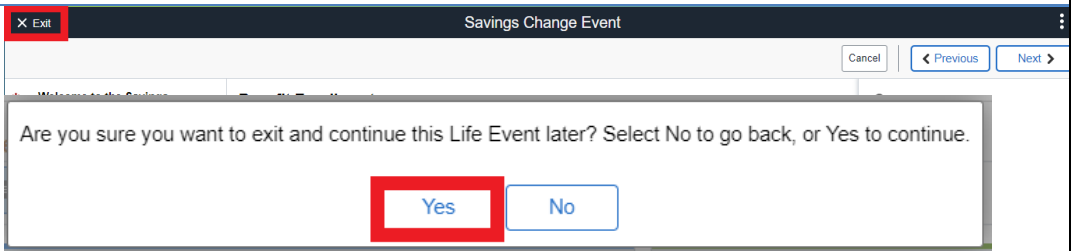
This statement records your Event Maint for PRS BAS Group benefit selections and pay period costs, dependent information, and beneficiary information at the time your enrollment is submitted. If an error has been made in recording your elections, please correct your elections before the event is closed. For further question, contact your benefits administrator. Please keep the statement for your records until you receive a confirmation statement.

Statement Sections

Expand All

- Personal Information
- Election Summary
- Dependents
- Dependent Enrollments
- Beneficiary Designations
- Investment Allocations

*Beneficiary Designations and Investment Allocations are stored with the Deferred Compensation vendor carrier of your 457(b) plan and will not be shown in PeopleSoft. Any information that we have in PeopleSoft is **historical** and can not be removed. To ensure your beneficiaries and investment allocations are accurate, please ~~reach out to~~ **contact** Nationwide or AIG directly.*



X Exit Savings Change Event

Are you sure you want to exit and continue this Life Event later? Select No to go back, or Yes to continue.

Yes **No**